DNBi REVOLUTIONARY CREDIT MANAGEMENT

DNBi Admin User Guide

D&B Decide with Confidence

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Administrator Functionality

Overview

Administrators are users who have specialised access to DNBi enabling them to create, add, modify and delete files, users and more. All Administrator functionality is found under the DNBi tab at the top of the page labelled “Admin”.

Administering Users

Adding New Users

Click Administer Users. Then click the button, “Add New User”. Here you will be able to enter all pertinent information about your user, including the ability to assign Roles and Live Report visibility. User roles are predefined and are available via an easy to use drill down list. You can choose multiple roles per user. Roles limit or allow users’ access to certain features. For the roles matrix see Appendix A.

Configure IP Security

You may restrict your users from only accessing DNBi via selected IPs. The locations entered below must be “Public IPs” and not of those issued within a “Private Network.” To get to this functionality, click Administer Users. Then click the button, “Configure IP Security”. You can upload a list of IPs from your technology department or you can manually type in one or more IPs.

Set Role Permissions

Role permissions are predefined. To collapse all role permissions so you can customise to your needs, click the icon on the upper right hand part of the screen that says “Collapse All”. This screen shows all available permissions per specific role. So, for example, you can set the permissions for all users whom you have assigned the Credit Analyst Role. This makes the administration of your user types much simpler to create and to modify as needed. ECF Permissions relate to Live Reports (ECF = Electronic Credit File, also known as the Live Report).

Add Groups

Here you can name a Group, and all those who belong to it will be able to have one or more of the following permissions: Order D&B International Live Reports—charges may apply depending on your contract.

When a group is created and given access to one of the features listed above, only users who are enrolled within that group will have access to the feature from that point forward. Please note, this is especially important when assigning International report ordering privileges, as any user not in the group will be restricted from ordering any international report regardless of role.

Deleting Credit Files

Here you are able to delete a predetermined company file type(s): Credit Applications, Accounts, D&B Live Reports and/or Snapshots.

Export Data

On this page you can create a filter and criteria for exporting data or review the status of pending and completed exports—just click the “Export Data” button.

For more information please contact your Relationship Manager or our Customer Service team on 0870 243 2344.

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